

Preventive Ethics Coordinator Training Tools and Hand-off Guide

Congratulations on your appointment to the role of Preventive Ethics Coordinator (PEC) and welcome to the IntegratedEthics® (IE) team! As an IE team member, you will be joining VHA's efforts to move ethics into the organizational mainstream and to coordinate ethics-related activities throughout the facility.

The aim of preventive ethics (PE) in health care is to produce measurable improvements in ethics practices by implementing systems-level changes to reduce gaps in ethics quality. As coordinator of the preventive ethics function in your facility, your role is to lead efforts to improve health care quality by identifying, prioritizing, and addressing ethical issues on a systems level. You're also a core member of the facility's IE Council.

This document is designed to assist with the transition into your new role. As the new PE Coordinator, you will want to review the following training tools and IE program elements or processes and work closely with your outgoing predecessor as well as with other IE staff (primarily the IE Program Officer and Ethics Consultation Coordinator). If your predecessor is unavailable, work with your IE Program Officer to locate another PE Coordinator in your VISN to help orient you to your new role, as this should make the process much easier.

The organization of this guide is in two parts. The first part outlines specific training tools that you will use as the PEC. The second part outlines specific information you will need to continue the work required of the Preventive Ethics (PE) program.

Part I – Training Tools

1. **Website** (located on the VA intranet)

The primary source of materials for the IE Program is the National Center for Ethics in Health Care (NCEHC) website: <http://vawww.ethics.va.gov/integratedethics/index.asp>.

The IntegratedEthics® (IE) pages on the website are organized by **IE program elements** (i.e., overall program management; ethics consultation; preventive ethics; and ethical leadership) *and* by **file type** (i.e., primers and guides; tools, activities, and documentation; communication tools; training and development; and assessment and evaluation).

On the right-hand side of every IE page is a box with helpful links and tools that provides quick access to resources of interest to all IE staff, including an index of all IE Resources on one page, IEWeb resources, a spreadsheet of key IE function leads (i.e., ECC, PEC, IEPO, ELC, VISN IE POC, and VISN IE Senior Lead) in each facility and VISN, instructions to register for the IE Mailgroup, the national IE policy VHA Directive 1004.06, a document listing the health care ethics domains and topics, and a link to the IE Improvement Forum Call pages.

The left-hand side has categories to explore when looking for information about NCHEC policies, publications, and other activities to enhance your understanding about ethics in health care.

The Preventive Ethics page is located here:
<http://vawww.ethics.va.gov/integratedethics/pec.asp>

2. VHA IntegratedEthics Staff Mail Group

The next step is to register for the IE mail group, so you can get information, updates, and IE Improvement Forum call reminders. You can register by using this link:

<http://vaww.ethics.va.gov/integratedethics/regindex.asp>.

3. Training Materials

The following training materials will help you in understanding your role as PE Coordinator, the PE function, and the overall IE program.

- a. [Preventive Ethics \(PE\) Primer](#) – This core document outlines the PE quality improvement approach in VHA and is essential reading for the PE Coordinator. It is suggested that new PEC's read and become familiar with the [IE Program Officer's Desk Reference](#), [Ethics Consultation \(EC\) Primer](#), and [Ethical Leadership \(EL\) Primer](#) as well.
- b. [Preventive Ethics Adventure 1: Advance Directives](#) – This is a fun interactive module in TMS that allows you to walk through completion of a PE project and should be completed by all PEC's. It is also suggested that new PEC's view the EC and EL videos, which are accessible on the [IE Training and Development webpage](#).
- c. [Online Learning Modules](#) – A series of online learning modules include independent study resources for key domains of ethics in health care, an introductory training module for IEWeb, and webinars on a range of ethics topics.

4. IEWeb

IEWeb is a software application built inside of Salesforce, a cloud-based platform used for multiple VA applications. IEWeb is designed to facilitate the work of IE, providing one location for you to record, track, and summarize the full range of your IE activities, whether they be ethics consultations, preventive ethics projects, or other ethics activities. IEWeb has three components: Ethics Consultation (EC), Preventive Ethics (PE), and Ethics Activity Log (EAL). To obtain access to IEWeb, you must first complete an introductory training module on the Salesforce platform in TMS (Course VA 39735). You can access the training module [here](#). In addition to completing the training, your IE program officer will need to submit a request for permissions to NCEHC. As PEC, you should request at a minimum "PE Administrator" and "EAL Member" permissions, allowing you to create, edit, read, finish, terminate, and reopen PE records and create, edit, read, and finish EAL records. You can review IEWeb resources, including FAQs, User Guide, and Quick Reference Guides, on the [IEWeb page](#) of the IE website.

5. IE Program Performance Requirements

Each facility and VISN is required to meet IE quarterly and/or annual programmatic achievement goals. The VISN IE Point of Contact (POC) typically manages this process for each VISN. Achievement of all end-of-year required elements (including Ethics Consultation, Preventive Ethics and Ethical Leadership) is due at the close of Fiscal Year Q4. Each quarter, the VISN IE POC should send a reminder of requirements and any instructions for facility reporting to the facility IE Program Officer, who will work with you to complete the documents and surveys as required. Most of the data for program achievement requirements is compiled by NCEHC from IEWeb. The IE Performance Measure Technical Manual and other useful information is available at the following link:

<http://vaww.ethics.va.gov/integratedethics/ieprogrpt.asp>

6. IE Improvement Forum Calls

For ongoing support of the program there are monthly calls for each function within the IE Program. The PE call is typically the second Monday of the month. The schedule and summaries of all the calls are available on the IE website:

<https://vaww.ethics.va.gov/integratedethics/TA.asp>.

Locate the “PEC Orientation” call and, if possible, arrange your schedule to attend. Many of these calls are recorded, so you can access slides, other documents, and a link to the recording on the [IE Improvement Forum Documents SharePoint page](#).

7. Individual Support

For individual support, you may contact the NCEHC IE Team by sending a message to VHAethics@va.gov.

Part II – Hand-off Guide and Organizer for Facility Preventive Ethics Program

As the new PE Coordinator, you will want to review the following IE program elements or processes by working with your outgoing predecessor (ideally) as well as with current IE program staff (primarily, the IEPO and ECC). You may find the organizing table below helpful in tracking status.

1. PE Team Meeting Schedule and Location
 - a. Agenda planning
 - b. Structure for meetings
 - c. Education activities
2. What Projects Have Been Completed in the Last Year?
 - a. Any further action required on these projects?
 - b. Results from the projects
3. What Projects are Currently in Process?
 - a. Names of projects
 - b. Step within cycle and current assigned actions
4. Reporting Process to IE Council and/or IEPO
 - a. Reporting frequency
 - b. Report format
5. IE Facility Workbook
 - a. Current findings
 - b. Future plans to address
6. Policy Review
 - a. Process
 - b. Current status
7. Joint Commission
 - a. Role
 - b. Current status

8. Performance Measures
 - a. Reporting process
 - b. Progress towards meeting this year's PE measure(s)
9. Identify your VISN IE Point of Contact (POC). To access this formation, visit this link: <https://vaww.ethics.va.gov/integratedethics/keystaff.asp>.

Organizer

IE Program Element/Process	Current Status	Next Steps
PE Team Meeting Schedule and Location		
Current Projects		
Reporting Process to IE Council and/or IEPO		
IE Facility Workbook		
Policy Review		
Joint Commission		
Program Reporting		
IEWeb Training and Access		